

1. Home Page Scheduler



Where: Home Page - > Scheduler

Overview: You may wish to use the Scheduler to keep track of your appointments. Using the Scheduler for client appointments allows you to create an encounter right from the home page.

Note: You must install Silverlight on your computer the first time you access the Scheduler.

Start: To create an appointment, click on *Edit/Add Schedule*.

1. The Scheduler will open a new window, showing your schedule for today. Use the week or month tabs to locate the appropriate date.
2. You may also change the interval of the appointment that is created using the dropdown.
3. Click on the timeslot you wish to fill. This will open an appointment window.

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Schedule for:		Start Date:	5/19/2011	End Date:		Refresh	Search Calendar	Edit/Add Schedule
Start	End	Summary		Status	Actions			
5/19/2011 11:00 AM	5/19/2011 11:30 AM	Client: Barbie, Malibu Service: Community Crisis Support Test		Scheduled	Review Create Encounter			

Scheduler

1

Day Week Month Timeline

May 19, 2011

O'Brien, Kate

19 Thursday

07:00 AM

08:00 AM

09:00 AM

10:00 AM

11:00 AM

Client: Barbie, Malibu Status: Scheduled Service: Community Crisis Support

2

Interval 30 Minutes

Normal Appointment Scheduled Service



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4. Choose Normal appointment (staff meeting) or Scheduled appointment (with a specific client). The required fields will be highlighted in red.
5. You may create a recurring weekly appointment by clicking "edit recurrence".
6. Save the Appointment.
7. Each time you log into WITS, you will be directed first to your Home screen. Your scheduler list defaults to today's appointments.
8. To create an encounter directly from the scheduler, simply click Create Encounter. This will take you directly to the encounter screen, in the current client's episode.
9. Use Search Calendar to find all appointments in a date range and schedule reminder calls.

Note: Staff may also set appointments for other staff if they have the "Manage Staff Schedules" role.

Once created, any appointment may be dragged to another timeslot or date, or even to another staff member's schedule.



Finish: You have now created appointments.

Scheduler Edit

Summary:

Staff: Conrad, Jennifer, BS

Start time: 1/21/2012 9:00 AM

End time: 1/21/2012 9:30 AM

Description:

Schedule Event Type:

Status: Scheduled

Appointment Type: Scheduled

Service: Adult Halfway Housing

Client: Child, Little

Contracting Agency:

Modality:

Buttons: Cancel, Save & Close, Edit Recurrence

Scheduler

Start	End	Summary	Status	Actions
5/19/2011 11:00 AM	5/19/2011 11:30 AM	Client: Barbie, Malibu Service: Community Crisis Support Test	Scheduled	Review Create Encounter